

LEAD CUSTOMER ACCOUNT CLERK

DEFINITION

To plan, assign, review the work of assigned customer accounting clerical personnel performing customer service duties; to perform the most complex clerical duties in the preparation, maintenance and processing of customer or public service revenue functions including water billing, business tax, parking citations, business license and permit applications; and to work directly with the public in response to inquiries about assigned function.

DISTINGUISHING CHARACTERISTICS

This is the lead level class in the Customer Account Clerk series. Positions at this level are distinguished from the other classes within the series by the level of responsibility assumed and the complexity of duties assigned. Employees perform the most difficult and responsible types of duties assigned to classes within this series including providing technical and functional supervision over accounting clerical personnel.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from the Revenue Manager.

Exercises technical and functional supervision over assigned accounting clerical personnel.

EXAMPLES OF DUTIES - Duties may include, but are not limited to, the following:

1. Plan, assign and review the work of assigned accounting clerical personnel; develop systems and procedures to increase efficiency of assigned functions.
2. Perform the processing of customer accounts related to an area of assignment including business tax, water service, parking citations, business license and permit applications.
3. Respond the public on the phone or in person regarding area of assignment; explain policies and procedures regarding area of assignment.

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EXAMPLES OF DUTIES

4. Maintain and update records of completed transactions or issued licenses and permits.
5. Verify accuracy of accounts related to area of assignment; make adjustments in accounts to reflect current balance; may prepare correspondence acknowledging receipt of payments.
6. Process, code, enter and verify numerical or financial data related to area of assignment.
7. Verify city bank deposits.
8. Notify customers of delinquent account balances; explain policies and procedures regarding collection of revenue in specific area of assignment.
9. Coordinate account activities with appropriate agencies and other city departments.
10. Compose correspondence and other documents related to area of assignment.
11. Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

- A. Practices of assigning and reviewing others work.
- B. Principles and practices of basic bookkeeping.
- C. Modern office practices, procedures, methods and computer equipment.
- D. Pertinent municipal, state, and federal codes, laws and ordinances.
- E. Plan, assign and review the work of others.
- F. Train and instruct others in customer accounting work.

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Ability to:

- G. Establish and maintain effective work relationships with those contacted in the course of work.
- H. Perform complex research on customer accounts.
- I. Communicate clearly and concisely, both oral and in writing.

Experience and Training

Any combination of education and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

Four years of responsible and specialized clerical, accounting or business experience with an emphasis on customer accounts including some technical supervision of others.

Training:

Equivalent to the completion of the twelfth grade with additional education highly desirable.

PROBATIONARY PERIOD: Six months

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AAP GROUP: 15

FPPC STATUS: Non-Designated

FLSA STATUS: Exempt